

CRED

Columbia Research Enhanced Real Estate ETF Analyst Report

CRED tracks an index comprised of US REITs. The strategy is based on a multi-factor criteria evaluated by Columbia Threadneedle and Lionstone Investments.

ESG Themes and Scores

6.61/10

ESG Rate

52.03%

Global Percentile

79.88%

Peer Percentile

Performance Data

	CRED	ETF Database Category Average	Factset Segment Average
1 Month	3.43%	2.13%	3.00%
3 Month	4.34%	2.61%	3.59%
YTD Return	14.49%	10.69%	9.68%
1 Year Return	12.07%	13.13%	10.41%
3 Year Return	10.71%	9.37%	6.76%
5 Year Return	N/A	2.15%	1.89%

Top 5 Holdings

Symbol	Holding	% Assets
PLD	Prologis, Inc.	12.58%
EQIX	Equinix, Inc.	9.76%
SPG	Simon Property Group, Inc.	8.22%
AMT	American Tower Corporation	8.04%
DLR	Digital Realty Trust, Inc.	6.13%

Vitals

Issuer	Ameriprise Financial
Brand	Columbia
Structure	ETF
Expense Ratio	0.33%
Inception	Apr 26, 2023
Index Tracked	Beta Advantage Research Enhanced REIT Index - Benchmark TR Gross

ETF Database Themes

Category	Real Estate
Asset Class	Real Estate
Asset Class Size	Mid-Cap
Asset Class Style	Blend
Region (General)	North America
Region (Specific)	U.S.

FactSet Classifications

Segment	Equity: U.S. REITs
Category	Sector
Focus	Real Estate
Niche	REITs
Strategy	Multi-factor
Weighting Scheme	Multi-Factor

